

Importing and Installing Artsystems Custom Reports

Custom and New Report Installation

This document pertains to importing and installation of Custom Reports created by Artsystems support, as well as reports newly distributed via an Artsystems software update when the data location is not the default installation path which is *C:\Program Files\Artsystems GalleryPro* (or *Artsystems Studio* or *Collections*).

SAVE CUSTOM REPORT ATTACHMENTS

1. Open the email sent by Artsystems support containing custom Report attachments.
2. Save the attachments with the .rep extension to two separate folders, as follows:
 - a. Create a new folder called CUSTOM REPORT inside the Artsystems GalleryPro folder (or folder that holds your data) on the Main peer or Server. You may already have one from earlier report alterations. Save a copy of each attachment inside this CUSTOM folder.
 - b. Also save a copy of each report attachments inside the folder that holds your data on the Main Peer or Server.

1.

NOTE: Whenever the program is updated, copy and paste each custom report from the CUSTOM folder into the folder that holds your data.

3. Next, open the Artsystems program. Then open one of the modules. If the name of the report is not already listed in the Rpt dropdown list, select REPORT on the menu. From the drop- down list, select IMPORT.
 - a. A window called IMPORT REPORT LAYOUT will open. On the right side of the window, select BROWSE. Browse to the location of data and where you copied the report template in step 2b. Select the report template that you want to import by left clicking once. Then click OPEN.
 - b. In the IMPORT REPORT LAYOUT window, the Layout name box now is filled with the name of the template you just selected. The Description box may or may not be filled in. The Description box allows the User to choose how the report is represented or named on the Rpt or Doc dropdown lists. The description should be edited at this time if needed.

NOTE: The description or name can be edited only at this time.

- c. Additionally in the IMPORT REPORT LAYOUT window, there are 3 boxes identified as EDITABLE, DOCUMENT, and FULL PAGE. Review the properties of each of these selections:
- **Editable-** A check clicked in this box will allow a user to edit the report. This is helpful for labels, and various Works related reports. It is not suggested for financial reports where the information generated should always remain pristine. (If Editable is not checked the report will be un-editable by default)
 - **Document-** A check in this box will allow the report document to appear as a selection in the Doc drop down list. The report document will only generate for the record appearing in the form view or the selected record in the spreadsheet view. (Documents are always editable)
 - **Full Page-** A check in this box will allow the imported report to be an option as a Quick Report. The Quick Report can then be selected in the *Tools>Options* selection in the Menu. Designating the imported report as a Quick Report will allow you to select Run Report while in the form view of any record. The Quick Report prints the selected report only for this single record.
- d. After selecting the appropriate check boxes and confirming the description name, select IMPORT. The report will appear either in the Doc (Document) or Rpt (Report) drop-down lists, depending on your check box selections. If the report does not appear there immediately, close and re- launch the program and the report should now appear.

NOTE: If Security is turned on, the Program Administrator must grant rights to any selected user group. If security is turned off, and the report still does not appear in either of the drop-down lists, please call Technical Support.

If further assistance is needed, please contact Artsystems Support.
Artsystems Support 212-620-5500 x 2 <mailto:Support@Artsystems.com>